



Sugar and Sweeteners Outlook

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Strong Yield Forecasts for U.S. Sugarbeets and Sugarcane in 2016/17 Lead to Projection of Record Domestic Sugar Production

U.S. sugar supplies for fiscal year 2016/17 are projected to total 14.147 million short tons, raw value (STRV), a 233,000-STRV increase from the July *World Agricultural Supply and Demand Estimates* (WASDE) report. The increase is primarily due to production estimated to reach 9.208 million STRV, a record fiscal year level of domestic sugar production, eclipsing the high mark established in 1999/2000. Beet sugar production is projected to be 5.320 million STRV, a 128,000-STRV increase from the previous projection due to higher expected sugarbeet yields. The projection is based on the first yield forecasts for the 2016/17 crop published by the National Agricultural Statistics Service (NASS), which exceeded adjusted-trend yields in previous projections. Cane sugar production is projected to total 3.889 million STRV, a 120,000-STRV increase from the previous month, also based on relatively higher NASS sugarcane yield forecasts published in August, particularly for Louisiana and Florida. Total sugar use for 2016/17 is projected at 12.260 million STRV, including 12.080 million STRV used for domestic deliveries of food and beverage products, with both estimates unchanged from the previous month. Ending stocks for the year are increased 233,000 STRV from the July report, resulting in the stocks-to-use ratio for 2016/17 increasing from 13.5 percent to 15.4 percent.

The next release is
September 16, 2016

Approved by the
World Agricultural
Outlook Board.

Total U.S. sugar supplies for 2015/16 are estimated to be 14.151 million STRV, a 35,000-STRV decrease from the previous month. Estimated production is unchanged at 8.925 million STRV, including 5.049 million STRV for beet sugar and 3.877 million STRV for cane sugar. Total imports are estimated to be 3.410 million STRV, a 35,000-STRV increase from the previous month, as a 15,000-STRV reduction in imports under quota programs partially offset a 50,000-STRV increase in expected imports under the re-export program. There are no changes to estimated total use or food and beverage deliveries in the August WASDE, which total 12.230 million and 12.000 million STRV, respectively. The stocks-to-use ratio for 2015/16 is currently estimated at 15.7 percent, raised from the previous month's estimate of 15.4 percent.

Sugar production in Mexico in 2015/16 is reduced 2,000 metric tons, actual value (MT) from the previous month's estimate. This is the only change to 2015/16 total sugar supplies. Total use is increased 75,000 MT due to higher expected deliveries to the IMMEX program, with substantial increases in deliveries recorded in June and July as ample domestic supplies and changes to the IMMEX program have encouraged additional domestically sourced deliveries into the program. Ending stocks in 2015/16 are estimated to decrease by 77,000 MT compared to the July estimate. Production in 2016/17 remains projected at 6.100 million MT. Projected total use is 75,000 MT higher than the previous month, as higher IMMEX deliveries are expected to continue into 2016/17. Projected ending stocks are lowered, with the stocks-to-consumption ratio lowered from 28.4 percent in July to the current projection of 25.0 percent.

Strong National Yields for both Sugarbeets and Sugarcane in 2016/17 Raise U.S. Production Projections

U.S. sugar production for 2016/17 is projected to total 9.208 million short tons, raw value (STRV), which is a 248,000-STRV increase from the July projection. If realized, the current projection would represent a record domestic sugar production total, eclipsing the 1999/2000 total of 9.050 million STRV.

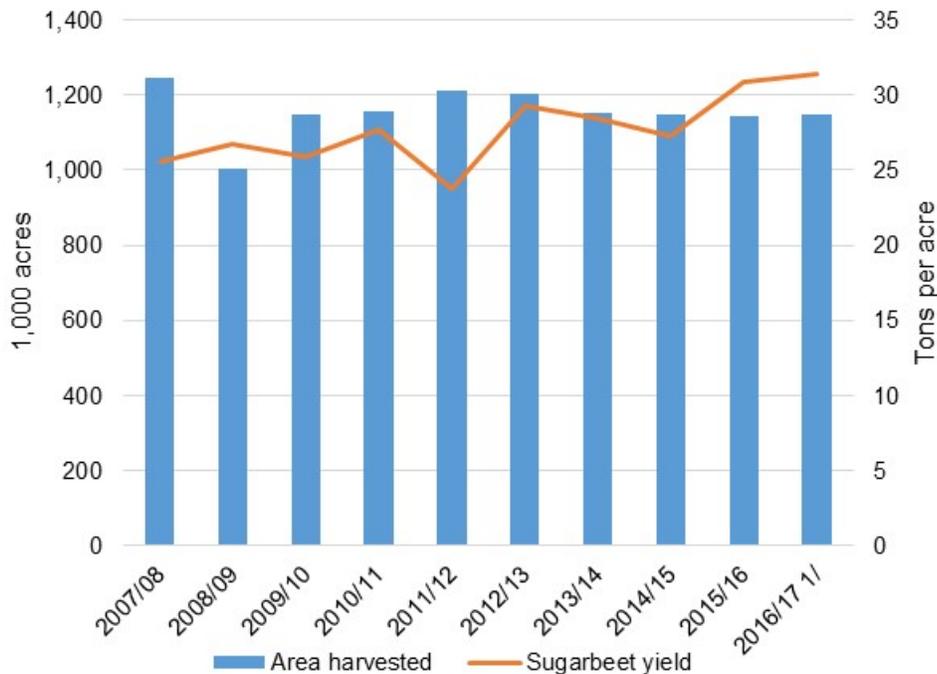
Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), August 2016.

Items	2014/15	2015/16 (estimate)	2016/17 (forecast)	2014/15	2015/16 (estimate)	2016/17 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	1,810	1,815	1,921	1,642	1,647	1,742
Total production	8,656	8,925	9,208	7,853	8,097	8,354
Beet sugar	4,893	5,049	5,320	4,439	4,580	4,826
Cane sugar	3,763	3,877	3,889	3,414	3,517	3,528
Florida	1,981	2,173	2,038	1,797	1,971	1,849
Louisiana	1,513	1,423	1,676	1,372	1,291	1,520
Texas	123	116	135	112	105	122
Hawaii	146	165	40	132	150	36
Total imports	3,553	3,410	3,018	3,223	3,093	2,738
Tariff-rate quota imports	1,536	1,686	1,507	1,393	1,530	1,367
Other program imports	471	350	125	427	318	113
Non-program imports	1,546	1,374	1,386	1,403	1,246	1,257
Mexico	1,532	1,359	1,371	1,389	1,233	1,244
Total supply	14,019	14,151	14,147	12,718	12,837	12,834
Total exports	185	75	25	168	68	23
Miscellaneous	0	0	0	0	0	0
Deliveries for domestic use	12,019	12,155	12,235	10,903	11,027	11,099
Transfer to sugar-containing products for exports under re-export program	103	130	120	93	118	109
Transfer to polyhydric alcohol, feed, other alcohol	28	25	35	25	23	32
Commodity Credit Corporation (CCC) sale for ethanol, other	0	0	0	0	0	0
Deliveries for domestic food and beverage use	11,888	12,000	12,080	10,785	10,886	10,959
Total Use	12,204	12,230	12,260	11,071	11,095	11,122
Ending stocks	1,815	1,921	1,887	1,647	1,742	1,712
Private	1,815	1,921	1,887	1,647	1,742	1,712
Commodity Credit Corporation (CCC)	0	0	0	0	0	1
Stocks-to-use ratio	14.87	15.70	15.39	14.87	15.70	15.39

Source: U.S. Dept. of Agriculture, Economic Research Service, Sugar and Sweetener Outlook.

Projected beet sugar production for 2016/17 is 5.320 million STRV, 128,000 STRV higher than the previous month's projection. The increase incorporates the National Agricultural Statistics Service's (NASS) first yield forecast for the 2016/17 crop, which totaled 31.4 tons per acre. This is larger than the previous year's total of 30.9 tons per acre. The relatively large yield forecast is somewhat offset by a reduction in forecast harvested acreage, totaling 1.147 million acres compared with the previous month's forecast of 1.149 million acres. Average shrink rates are currently expected for the 2016/17 crop, boosting production over the 2015/16 crop, which experienced relatively warm periods during the winter months that had detrimental storage impacts during the slicing campaigns. Sucrose recovery rates are projected to follow trend rates, assuming the strong yields are realized and normal weather conditions occur during the harvest and slicing season.

Figure 1
U.S. sugarbeet harvested acreage and yield, crop year, 2007/08 to 2016/17.



1/ Forecast.
 Source: U.S. Dept. of Agriculture, Economic Research Service.

Beet sugar production in 2015/16 is estimated at 5.049 million STRV, unchanged from the previous month. Early-season beet sugar production coming from sugarbeets harvested in August and September is expected to be larger than average, as incorporated into the 2015/16 estimate since the June WASDE report. That month's WASDE reflected the planting progress reports that showed the majority of sugarbeet plantings through mid-May, which are a good statistical indicator for early harvest proportions. Weather conditions will be an important factor in the timing of the current crop's harvesting schedule, but economic conditions currently do not motivate August and September production beyond the already relatively large early-season production accounted for in the 2015/16 estimate since the spring. Sugarbeet processors are carrying higher-than-average stocks after the previous summer's large sugarbeet crop and the relatively slower pace of deliveries early in the 2015/16 fiscal year. Growers and processors also require the cold temperatures of late fall and winter to allow for effective storage and piling of sugarbeets for the slicing campaign. As a result, this month's increase in the forecast 2016/17 sugarbeet crop is only reflected in larger 2016/17 beet sugar production rather than further increasing expected early-season production.

Cane sugar production in 2016/17 is projected to total 3.889 million STRV, a 120,000-STRV increase from the July report. This projection is 0.3 percent above the estimate for 2015/16. This is primarily due to reported yield forecasts in Florida and Louisiana for the 2016/17 crop year that are above trend levels and is particularly remarkable due to the relatively low levels of production projected for Hawaii. Cane sugar production in 2015/16 is estimated at 3.877 million STRV, unchanged from the previous month's estimate. There are also no changes to the State-level cane sugar production estimates.

Table 2: Sugarcane and cane sugar production, by State, crop year

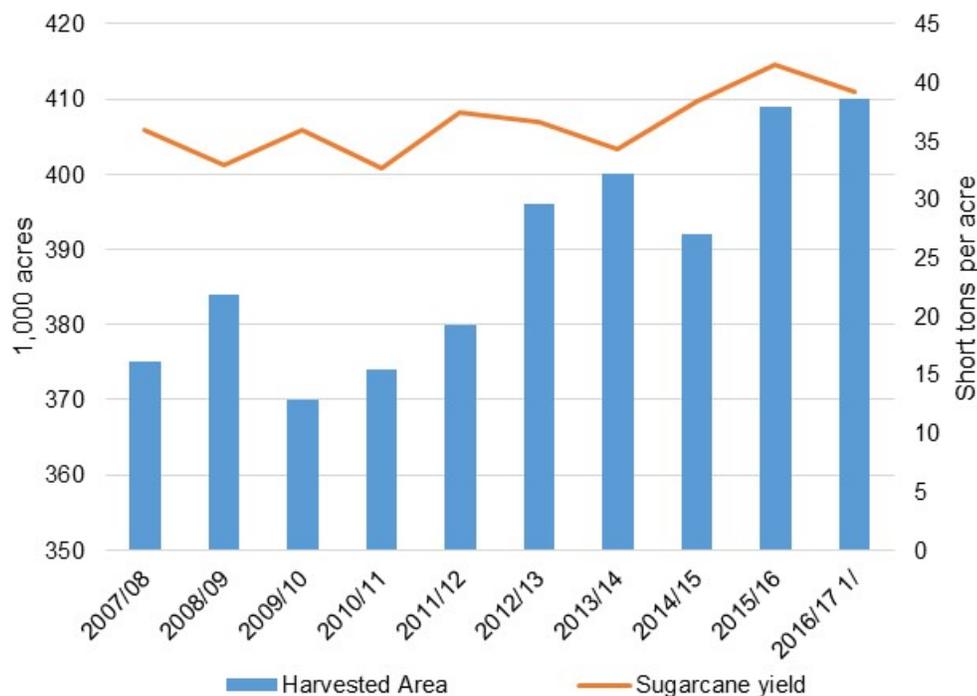
	Florida			Louisiana			Texas		
	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17
Harvested area for sugar (1,000 acres) 1/	408	424	425	411	410	440	33.1	36.6	40
Sugarcane yield (tons per acre) 2/	38.4	41.5	39.2	29.5	29.6	31.0	37.9	31.4	38.0
Sugarcane production (1,000 tons)	15,053	16,974	16,071	11,387	11,396	12,808	1,194	1,105	1,462
Sugar per acre (STRV per acre)	5.05	5.31	4.97	3.92	3.70	4.06	3.91	3.29	3.51
Sugar production (1,000 STRV)	1,981	2,173	2,038	1,513	1,423	1,676	123	116	135

Notes: 1/ Assumes 2016/17 has same proportion of harvest for sugar as previous year. 2/ Sugarcane for sugar yield.

Source: U.S. Department of Agriculture, National Agricultural Statistics Service

Florida cane sugar production in 2016/17 is projected to total 2.038 million STRV, a 48,000-STRV increase from the July report. NASS’s first forecast for 2016/17 sugarcane yields in the State is 39.2 tons per acre. This is lower than the 2015/16 crop’s record-high 41.5 tons per acre, but still larger than trend yields previously incorporated into the 2016/17 production projection. The current production projection implies yield of 5.06 tons of sugar per acre, compared with the previous month’s projected rate of 4.85 tons.

Figure 2
Florida sugarcane for sugar harvested area and yield, crop year

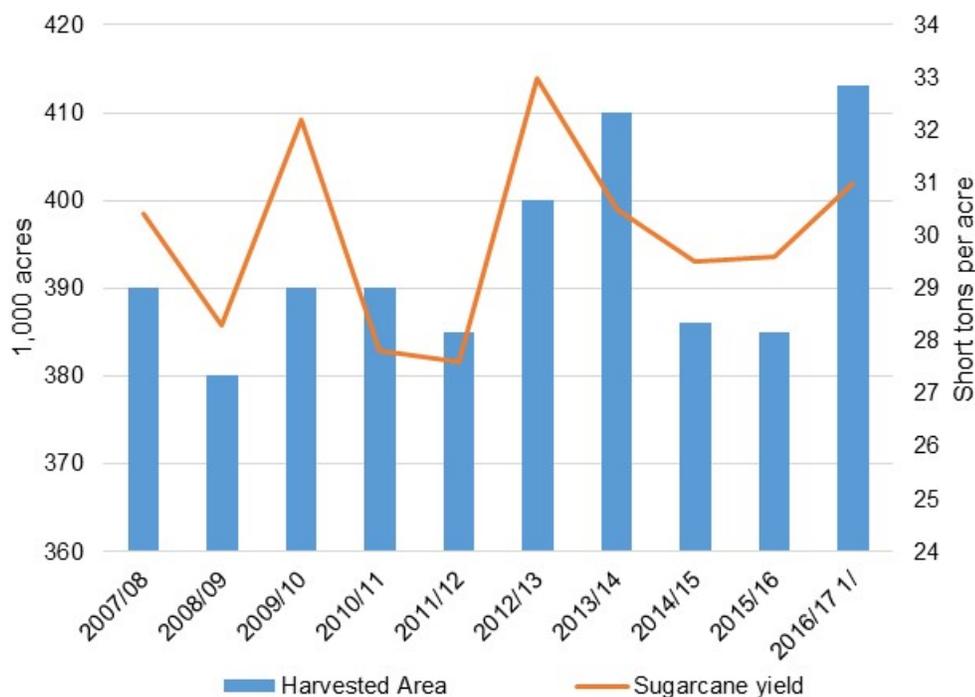


1/ Forecast.

Source: U.S. Dept. of Agriculture, Economic Research Service.

Louisiana cane sugar production in 2016/17 is projected at 1.676 million STRV, a 72,000-STRV increase from the previous month’s projection. Sugarcane yields for the 2016/17 crop are forecast to be 31.0 tons per acre, which would be the fourth-largest yield in the State going back to 1980/81. The current sugar production projection for the State implies a relatively large sugar per acre yield, but not as large as the 2012/13 crop that has the distinction of the 10-year maximum in sugarcane yields, sugarcane production, and cane sugar production. The current projection reflects numbers that are comparable to—but slightly less than—that 2012/13 crop.

Figure 3
Louisiana sugarcane for sugar harvested area and yield, crop year



1/ Forecast.
Source: U.S. Dept. of Agriculture, Economic Research Service.

Cane sugar production in Hawaii and Texas remains unchanged from the previous month’s report at 40,000 STRV and 135,000 STRV, respectively. Hawaii’s relatively low production projection is due to the announcement by the last remaining cane processor that it will be closing during 2016/17 and expects to produce only through the first few months of the fiscal year. Production in Texas is still recovering from several years of poor yields and sugar production due to unfavorable weather conditions that affected harvesting progress and cane quality. Indications are that the current crop is rebounding from the last several years, although weather will be an especially key determinant of the State’s production this year—which could be positive or detrimental to production prospects.

Mostly-Offsetting Monthly Changes to Imports Result in an Increase of Imported Sugar Supplies for 2015/16

U.S. sugar imports in 2015/16 are estimated to total 3.410 million STRV, a 35,000-STRV increase from the previous month. Imports under quota programs are reduced 15,000 STRV from the July report to 1.686 million STRV, as fewer shipments from the Dominican Republic are expected to come under the WTO raw sugar TRQ compared with expectations last month. The total shortfall for the 2015/16 WTO raw sugar TRQ is estimated to be 90,000 STRV, 15,000 STRV higher than the previous month, accounting for the entirety of the reduction in estimated quota imports. Imports under the re-export program for 2015/16 are estimated to be 350,000 STRV, which is a 50,000-STRV increase from the previous month’s WASDE, based on the current pace to date from data reported through June.

Imports from Mexico in 2015/16 are estimated to be 1.359 million STRV, unchanged from the previous month. The total represents the entirety of the Export Limit announced by the U.S. Department of Commerce (USDOC) subsequent to the March 2016 WASDE report, plus an additional 60,000 STRV amended to the Export Limit requested by the USDA and granted by the USDOC in April 2016. As of the August 2016 WASDE release, the Government of Mexico had not issued Export Licenses for the additional 60,000 STRV, however. It is still feasible

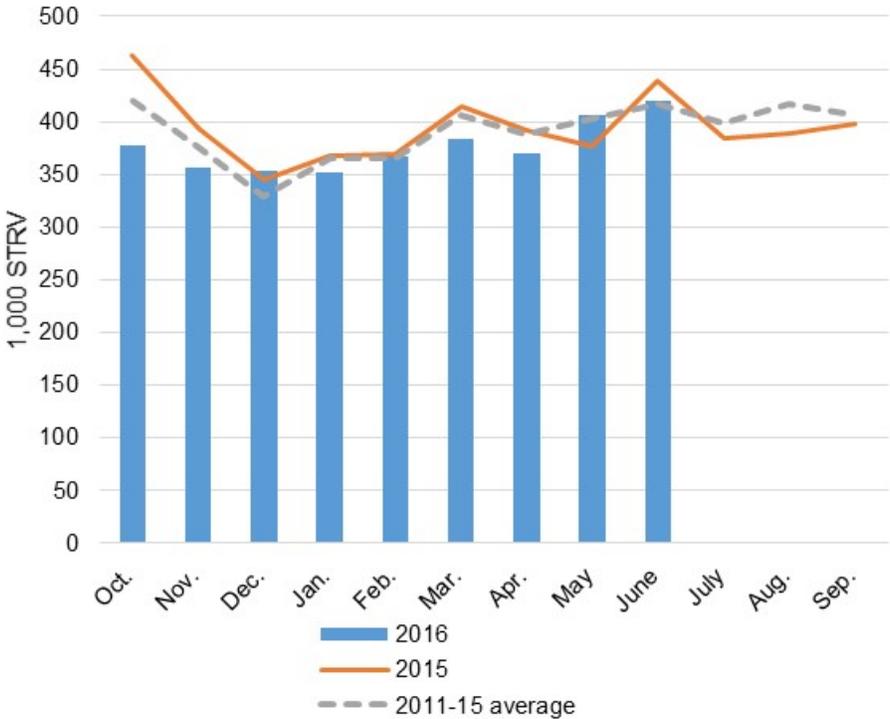
for the licenses to be issued and shipments made to the United States prior to the end of the current Export Limit Period on September 30, 2016. If the licenses are not issued, however, or if logistical issues are presented in the near future, then the current methodology of the estimate will need to be reviewed and adjusted.

U.S. sugar imports for 2016/17 are projected to be 3.018 million STRV, a 50,000-STRV decrease from the previous month. The only monthly change is to imports for the re-export program, which are reduced 50,000 STRV to 125,000 STRV. This reduction offsets the increase in the estimate for 2015/16, and with no additional exports expected in either 2015/16 or 2016/17, future imports under the program will have to be reduced in order to maintain the balance of licenses. Imports under quota programs for 2016/17 remain unchanged at 1.507 million STRV, with the WTO raw sugar TRQ shortfall projected to total 99,000 STRV. Imports from Mexico are also unchanged, projected to total 1.371 million STRV, based on the calculation of U.S. Needs using the July WASDE projections, as defined by the suspension agreements signed by the USDOC and the Government of Mexico in December 2014.

Domestic Sugar Deliveries, Maintaining This Year’s Pace, Remain Unchanged from Previous Estimate

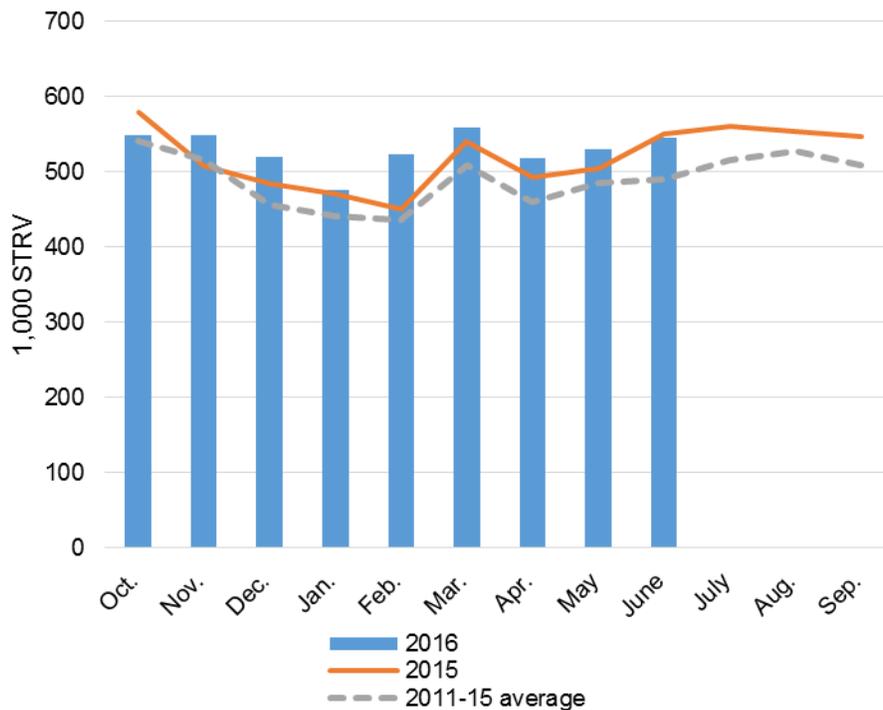
Total use for 2015/16 remains unchanged from the previous month’s estimate at 12.230 million STRV. Domestic deliveries for food and beverage use also remain unchanged at 12.000 million STRV. Through the first 3 quarters of 2015/16, total sugar deliveries for human consumption are 1.0 percent above the same period in 2014/15, at 8.771 million STRV. Beet sugar deliveries, which have lagged compared to recent years, especially in the first few months of 2015/16, are 4.9 percent behind the previous year’s pace through June. Beet sugar deliveries during the April to June quarter were 1.0 percent lower than the same period the previous year. Lower beet sugar deliveries are offset by cane sugar deliveries that are 4.1 percent ahead of the 2014/15 pace, with cane sugar deliveries during the April-to-June quarter 2.9 percent larger than the previous year.

Figure 4
Beet sugar deliveries for human consumption, monthly, fiscal year



Source: U.S. Dept. of Agriculture, Economic Research Service.

Figure 5
Cane sugar deliveries for human consumption, monthly, fiscal year



Source: U.S. Dept. of Agriculture, Economic Research Service.

U.S. sugar exports remain unchanged from the previous month at 75,000 STRV. They are down significantly from the previous year, however, due to changes to Mexico's IMMEX program regulations starting in February that disqualify U.S. sugar exports that benefit from the U.S. re-export program from obtaining duty-free status.

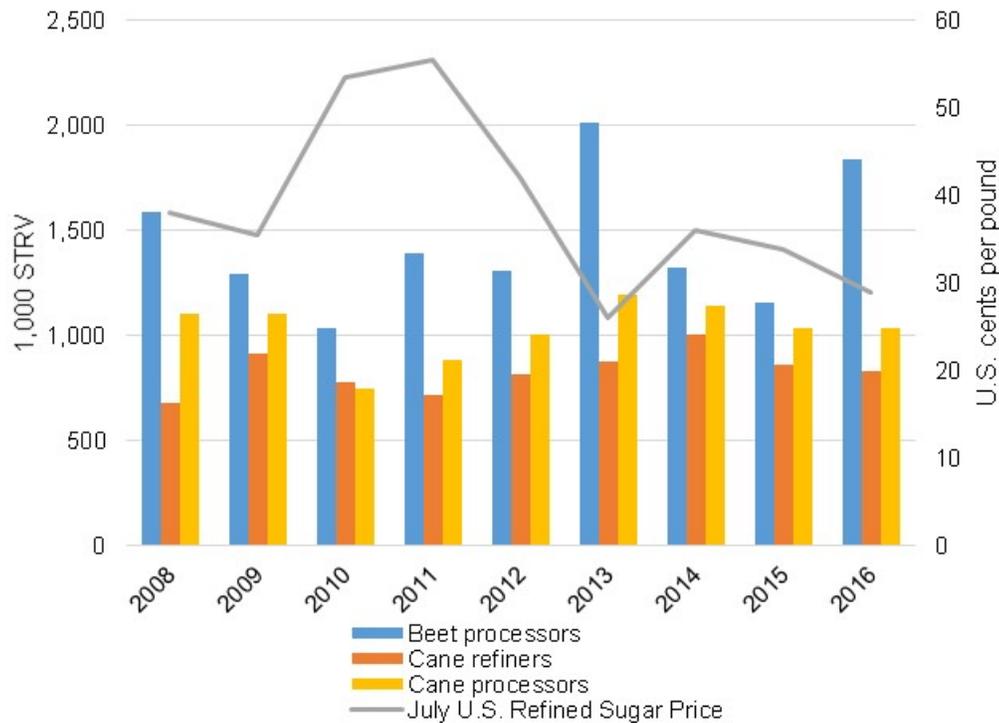
Total U.S. sugar use is projected to be 12.260 million STRV, unchanged from the July projection. Total deliveries for food and beverage use for 2016/17 are also unchanged from the previous month at 12.080 million STRV. The increase in food and beverage deliveries would be a 0.7-percent increase from the current 2015/16 estimate. Projected deliveries for other uses remain the same as the previous month's projection at 155,000 STRV.

Ending stocks for 2015/16 are increased 35,000 STRV to an estimated 1.920 million STRV, due solely to the increase in imports with no other changes to the balance sheet. The stocks-to-use ratio of the current estimates is 15.7 percent, compared with 15.4 percent estimated in July. Ending stocks for 2016/17 are increased 233,000 STRV to 1.887 million STRV, all accounted for by increases in total supplies, with the stocks-to-use ratio currently projected at 15.4 percent, up fairly substantially from the previous month's projection of 13.5 percent.

Through June 30, inventories of cane processors and refiners are comparable to the previous year. Following inventory levels of 12.9 percent lower for cane refiners and 21.4 percent lower for cane processors on March 30, those levels are now 3.4-percent lower and 0.7-percent larger, respectively, due to the completion of the season's domestic harvest and increased imports. Inventories for beet processors continue to be large, however, with June 30 inventories currently 59.0 percent above the previous year as the large beet sugar production and the slower pace of deliveries have resulted in a buildup of stocks. Since 1989/90, only June inventories in 2012/13 were larger than the current levels. This is likely one of the most significant among factors keeping U.S. wholesale refined sugar prices low, particularly with a large 2016/17 crop that will also likely have higher-than-average early-season production. Average U.S. Midwest wholesale refined sugar prices in July were estimated at 29.0 cents per pound by Milling and

Baking News (using the average low end of the weekly reported range). This compares with the previous year’s July price of 33.8 cents per pound—a 14.2-percent decline. By comparison, July 2013 refined beet sugar prices were 26.0 cents per pound.

Figure 6
Ending stocks, June 30, by processor type



Source: U.S. Dept. of Agriculture, Economic Research Service.

Mexico Concludes Harvest Season for 2015/16; Good Performance Led by Largest-Producing Gulf and Central Regions

Total sugar supplies in Mexico for 2015/16 are estimated to be 6.998 million metric tons, actual value (MT), a 2,000-MT decrease from the previous month’s estimate. The decrease is due to a downward adjustment for domestic sugar production to 6.117 million MT based on data released by Mexico’s *Comité Nacional para el Desarrollo Sustentable de la Caña de Azúcar* (Conadesuca) that show final sugarcane and sugar production statistics at the conclusion of the current year’s harvest season.

Table 3 -- Mexico sugar supply and use, 2014/15 - 2015/16 and projected 2016/17, August 2016

Items	2014/15	2015/16 (estimate)	2016/17 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	831	811	1,024
Production	5,985	6,117	6,100
Imports	128	70	10
Imports for consumption	8	13	10
Imports for sugar-containing product exports (IMMEX) 1/	121	57	0
Total supply	6,944	6,998	7,134
Disappearance			
Human consumption	4,408	4,431	4,498
For sugar-containing product exports (IMMEX)	337	330	330
Statistical adjustment	-54		
Total	4,691	4,761	4,828
Exports	1,442	1,213	1,183
Exports to the United States & Puerto Rico	1,311	1,163	1,173
Exports to other countries	131	50	10
Total use	6,134	5,974	6,011
Ending stocks	811	1,024	1,123
	1,000 metric tons, raw value		
Beginning stocks	881	859	1,086
Production	6,344	6,484	6,466
Imports	136	74	11
Imports for consumption	8	14	11
Imports for sugar-containing product exports (IMMEX)	128	60	0
Total supply	7,361	7,418	7,562
Disappearance			
Human consumption	4,673	4,697	4,768
For sugar-containing product exports (IMMEX)	357	350	350
Statistical adjustment	-57	0	0
Total	4,973	5,046	5,118
Exports	1,529	1,286	1,254
Exports to the United States & Puerto Rico	1,389	1,233	1,244
Exports to other countries	139	53	11
Total use	6,502	6,332	6,372
Ending stocks	859	1,086	1,190
Stocks-to-human consumption (percent)	18.4	23.1	25.0
Stocks-to-use (percent)	13.2	17.1	18.7
High fructose corn syrup (HFCS) consumption (dry weight)	1,444	1,450	1,450

1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

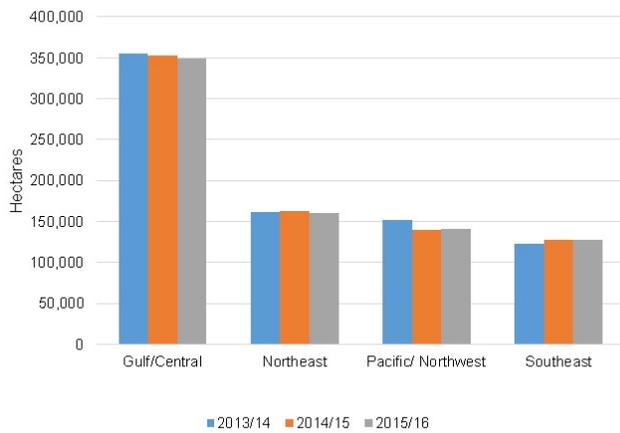
Source: USDA, *World Agricultural Supply and Demand Estimates* and Economic Research Service, *Sugar and Sweeteners Outlook*; Conadesuca.

Based on Conadesuca's latest reports, Mexico harvested 778,000 hectares, yielding 54.189 million MT of sugarcane in 2015/16. While this was a 0.7-percent decline in area, sugarcane production increased 1.1 percent compared with 2014/15. The 2015/16 sugarcane harvest season was characterized by few setbacks and very favorable overall weather conditions throughout the season, which began in November or December and concluded between April and July, depending on the region.

In 2014/15, high levels of precipitation and extreme weather conditions hit the Mexican State of Veracruz during the late winter and early spring, which is part of Mexico's largest sugar-producing Gulf and Central regions. This delayed the harvest in much of Veracruz during the peak season and had a detrimental impact on sugarcane yields in the field and recovery rates in the mill. The region recovered in 2015/16, with sugar production increasing 4.3 percent from the previous year despite 1.1 percent fewer hectares of sugarcane harvested. Year-over-year

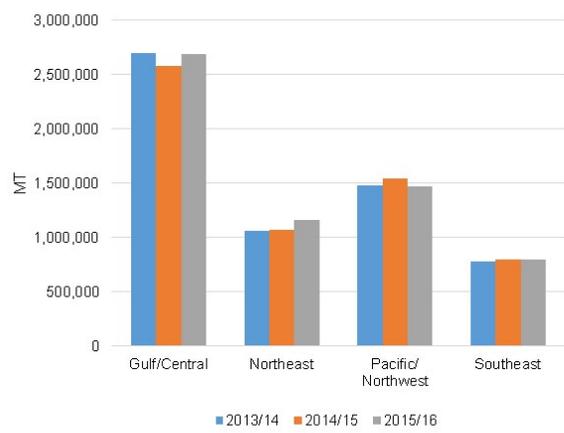
production growth in the remaining Northeast, Pacific/Northwest, and Southeast regions mostly offset one another, increasing a combined 0.6 percent.

Figure 7
Mexico sugarcane harvested area, by region, 2013/14 to 2015/16



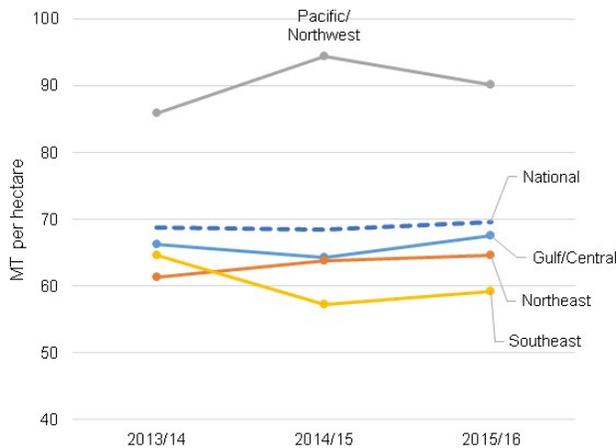
Source: Conadesuca.

Figure 8
Mexico sugar production, by region, 2013/14 to 2015/16



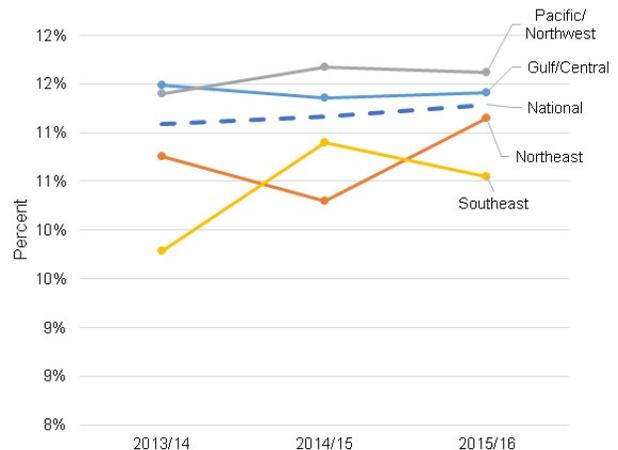
Source: Conadesuca.

Figure 9
Mexico sugarcane yields, by region, 2013/14 to 2015/16



Source: Conadesuca.

Figure 10
Mexico industrial recovery rates, by region, 2013/14 to 2015/16



Source: Conadesuca.

Compared with Conadesuca's initial estimate in the fall of 2015, prior to the beginning of the harvest season, the 2015/16 crop outperformed expectations for sugarcane yields and mill recovery rates. This resulted in more sugar production, despite a lower harvested area than expected. Again, much of the performance can be attributed to favorable weather and growing conditions throughout the country, particularly in the Gulf/Central region.

Table 4: Mexico 2015/16 sugarcane crop, initial estimate vs. actual

	Initial estimate	Actual	Difference
Harvested area (hectares)	801,510	778,098	-2.92%
Sugarcane yields (MT per hectare)	67.6	69.6	3.00%
Sugarcane production (MT)	54,189,784	54,188,609	0.00%
Recovery rate (percent)	11.15	11.29	1.26%
Sugar production (MT)	6,044,340	6,117,048	1.20%

Source: Conadesuca.

Total use in 2015/16 is estimated at 5.974 million MT, a 75,000-MT increase from the previous month's projection. Estimated domestic deliveries for human consumption remain unchanged from the previous estimate at 4.431 million MT. Total exports also remain unchanged at 1.213 million MT, including 1.163 million exports to the United States.

Domestic deliveries for the IMMEX program reflect the entirety of the change, totaling 330,000 MT for the year. Through July, year-to-date domestic deliveries for the IMMEX program are 38 percent larger than the previous year, according to Conadesuca. This increase is primarily due to large shipments in the months of June and July. With relatively large supplies available after a strong harvest, constraints on the volume of exports to the United States due to the suspension agreements, and limited export opportunities in the global market due to price competitiveness, delivering to the IMMEX program could be an attractive outlet for Mexico's sugar processors. Additionally, changes to the IMMEX program's regulations earlier in the year disallowed U.S. sugar exports that benefited from the U.S. re-export program from gaining duty-free status that the IMMEX program provides. As a result, there is an opportunity for domestic sugar to gain additional market share in the program. The current estimate assumes that the pace to date through July is carried through to the end of the year.

Ending stocks for 2015/16 are estimated to be 1.024 million MT, a 77,000-MT decrease from the previous month's estimate due to the small decline in production and increases in deliveries. The stocks-to-consumption ratio is also lowered from 24.9 percent in the previous month to the current rate of 23.1 percent.

Total sugar supplies in Mexico for 2016/17 are projected to be 7.134 million, 77,000 MT lower than the July projection due to lower beginning stocks carried into the year. Projected production is 6.100 million MT, unchanged from the July WASDE. Conadesuca's first official estimates of the 2016/17 crop are expected to be released in the fall of 2016. Imports are projected to be 10,000 MT, all of which are expected to be for human consumption, as the aforementioned changes to the IMMEX program are expected to result in no imports to enter for the program.

Domestic deliveries for human consumption remain unchanged from the previous month, at 4.498 million MT. Domestic deliveries under the IMMEX program are increased 75,000 MT from the July projection, matching the updated estimate for 2015/16. Total projected exports for 2016/17 are 1.183 million MT, including 1.173 million MT projected to be shipped to the United States. Shipments to the United States are based on the U.S. Needs calculation using the July WASDE, as determined by the agreement suspending the countervailing duty investigations signed between the USDOC and the Government of Mexico in December 2014.

Ending stocks for 2016/17 are projected to be 1.123 million MT, a 152,000-MT decrease from the previous month's projections, due to projections of both fewer supplies and higher total use. The stocks-to-consumption ratio is likewise reduced to 25.0 percent, compared with the rate of 28.4 percent under the previous projections.

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Sugar and Sweeteners Outlook <http://www.ers.usda.gov/Publications/SSS/WASDE> <http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documented=1194>
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